SB Financial Services

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2019
YEAR IN REVIEW

Last year brought five new locations, an expanded team of skilled professionals and additional opportunities for education and community engagement. Thank you for a great year!

$225,284,183.37
in client assets serviced through LPL Financial

96%
Client Retention in 2019

#lplfocus2019
LPL Focus Conference in San Diego, CA
There were 8,000 Financial Professionals in attendance. The week was full of amazing educational and networking opportunities. We couldn't wait to bring back all that we learned and apply it to our practice.

On the Move

2 Advisory Council Meetings • 2 Seminars Hosted • 3 Notaries
4 Certified Financial Planner™ Professionals • 5 Attendees at the LPL Focus Conference
8 Licensed Insurance Agents • 10 Educational Workshops • 13 Locations of Convenience
73.5 Volunteer Hours • 202 Continuing Education Hours • 650+ Hours of Study for CFA & CFP Exams
$1000+ Raised for Various Community Organizations • 85,456 Economic Update Emails Sent

Once a month, members of Financial Services and Wealth Management volunteer at the River Food Pantry in Madison, WI. The River serves over 1,000 household every week in the pursuit of its vision: a fully nourished community. [Top Picture]

The ADAW (Alzheimer's & Dementia of Wisconsin) is thankful for the Holiday Giving Charity Donation from their community supporter, State Bank of Cross Plains Financial Services. [Bottom Picture]

New in 2020

My Rep Chat

Clients & Advisors are now able to communicate via text. This is great for client appointment reminders too!

Guided Wealth Portfolios

Technology has made investing easier than ever before. You get complete visibility into your portfolio and can rely on sophisticated algorithms to keep your portfolio lined up with your goals. But technology can be enhanced when combined with humans who can dive deeper into issues and use reasoning to make the best decisions. That's why we now offer Guided Wealth Portfolios; digital investing platform that combines new technology with years of experience and advice. Learn more: www.lplguidedwealth.com/advisor/christinesperry